****1) Financial markets:****

\* Cryptomarket

\* FOREX (Foreign exchange market)

\* Capital markets

\* Commodities

\*

Ways to make money:  
- Long-term investments

**-** Trading

**- Arbitrage**

****3)** **Banned countries**: Ukraine, Moldova, France, Ukraine, Germany, USA, Israel.**

****4)** **Financial strategies****

* **Bullish strategy**: This is when an investor believes that the price of an asset (like stocks) will rise. They might buy assets to profit from the expected increase in value.
* **Bearish strategy**: This is when an investor expects the price of an asset to fall. They might sell assets or short-sell (betting that the price will decrease) to profit from the expected decline.

In short:

* **Bullish** = Expecting prices to go up.
* **Bearish** = Expecting prices to go down.

**5) Forms of paraverbal**

\* Whisper effect

\* Silence technique

\* Tone of voice

\* Active listening

**6) Must be avoided:**

- Making promises under any shape or form

- To use profanity against other clients

- Consent words or phrases(Can I, Can you, Mai I, Sir)

- Sensitive words (Gambling, Fraud, Lose money, Scam)

**7)** **KYC**

- Canadian?

- USA documents

- Job/income

- Mortgage/ Rent/House

- Loans/Debts

- Family

- Savings

**8) Leverage and margin.**

* **Leverage**: This refers to using borrowed money to increase the potential return on an investment. Essentially, it allows you to control a larger position with less capital. For example, with leverage of 2:1, you can control $100 worth of assets by only putting up $50 of your own money.
* **Margin**: This is the money you borrow from a broker to trade using leverage. It’s a loan you take to increase your position size. The margin is the required amount of capital you need to put up in order to take on a leveraged position.

**9) Contract for difference (CDF)**

- Working with CDF trader does not actually own asset to which he is tied. He buys only

- CDF can be linked to any type of assets such as stocks, commodities, bonds, crypto and so on.

- No need to own

- Traders can make money working with both bullish and bearish market, with high leverage.

**10) NFP (Non-farm payroll)**

NFP(non-farm payroll) is a measurement of the change in the number of employees, excluding farm & government, in the USA during previous month.

**How to make money?**

**-** Rate of employment

If job growth is really strong, it’s a good sign to invest in stock market. If otherwise – to sell.

- Rate of unemployment

If the unemployment rate is low the USD strength is growing. If no – the same like in **p1**.: strength is weakening.

- Auto trading is offered to clients to. But Financial Experts are better. (Shortly saying)

Expert’s analysis based not only at algorithms, but and at differ, unusual factors , that can affect financial market too.

Does the company provides the software? Yes, it does. But for the first time, until the client has no enough experience, the best way is to work with Financial experts.

- A major fact that affects the financial market are the **news** (also called **fundamental analysis**).

- Another: **patterns** (or **technical analysis)**.

- Trading signals (Trigger signals to buy or sell the assets)

How client can be sure, that he will not lose money – Thanks to Risk management tools (An automated tool that help you buy/sell assets with established price, to prevent lose of money).

+ Diversification strategy

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\* Intro

\* Some questions about the personality (Age, Job/Income, Family, Loans/ Debts, Savings, Mortgage)

\* Specify interests/goals, intends and the main thread for the future conversation and the offer base.

\* Why he needs investments? Money/Family, Curiosity?

\* Creating interesting offer for person.

19.01.2024

**Financial Strategy**

- Commission: From the start it is about 1%, And can grow with time up to 10%;

- Trading signals: Signals to sell or to buy assets. Can be generated by human analysis or generated using mathematical algorithms based of market actions.

- Financial analytics is offered by financial advisers based on fundamental and technical analysis.

- Platform: user friendly platform comes with a variety of highly advanced charting tools and technical indicators.

- Personal Portfolio: is a collection of investments did by customer. It’s fully managed and diversified by company.

- Risk management: A number of risk management measures are being taken. First of all it comes to the financial expert. Doing all the fundamental and technical analysis.

- Financial expert: has more than 10 years of experience if offered to build the best strategy possible for each individual client. Every client has his personal financial expert.

**Road**

**INTRO**

Greeting and some **questions** about the client.

Hello, am I speaking to May?

…..

**KYC**

**What can offer company?**

Why I’m asking these questions?

- Personal Financial Strategy (based on client’s goals: mortgage, car, house and so on)

- Risk management (Platform has risk management tools)

- Commission (We are interested in clients profit, because company’s profit is in commission)

- Financial expert (Are active 24/5 and will guide all the time)

- Trading signals (Are maid by algorithms and can be made by the client’s analysis)

- Financial Analytics (Client Always can receive advise from experienced trained)

- Platform (Platform has all the necessary tools for investing and anylysis)

- Personal Portfolio (Portfolio gives a comfortable opportunities to handle your investments)

SAFETY PILLOW

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- Hello, am I speaking to X?  
- I’m Nick from the KP Company, contacting you regarding the request you left at our investment platform. I was assigned as your personal account manager, and today I’ll be helping you.

If you don’t mind, I would like to ask you some questions to make sure, that we fit each other and tell you about our company and what we can provide you.

- Yes, lets do it.

- Our company is working mostly with Canadian people, so , tell me please, are you from Canada?

- Yes

- But do you have some documents related to USA, like driver license, passport or something else?

- No, I have no.

- Glad to hear it. So, would you like to know firstly about our company and opportunities we provide, or do you want to know some more about this field and how to work in it?

- I don’t know how does it work… Could you explane it to me?

- Yes, of course. Shortly saying today, you make small investments by purchasing financial assets for 100 dollars, and selling them tomorrow for 120. With us you will be able to buy assets on differ markets: Forex, cryptomarket, commodities and so on. To analyze which assets are more profitable and will bring you greater profits, there are many tools and algorithms for market analysis, as well as an experienced expert who will teach and assist you.

- We are an investment’s institution, helping prospects with investments, or gain additional experience. Apart from providing you with personal FA and webtraider we also creating strategy for your investments, which depends on your goals, personal preferences, financial situation and so on. Based on our experience most people are in need of help with paying mortgages. We also help to business owners or potential homeowners, as well as retirement plans.

- So, first of all, do you have any kind of previous experience in this field?

- No

- Not a problem, I’m here to guide you further and provide you with all answer, but after the passing out the registration process and you’ll start the process, our experts will help you to go further step buy step, so don’t worry about it.

-Of course as a company we are looking toward for long term relations. And the best way to do it, to help you get closer to your goals. Do you have any particular goal that you would like to achieve from this investments?

**Goals – extra incomes/just curios.**

All great ideas and profitable beginnings start from just curiosity. Today money are key for a lot of great opportunities in your life, like to pay rent for house, to go in trip to relax, to grow up your personal business. Probably, you want to by your own house, or pay the mortgage?

**\*** it’s very nice target! Believe, you’ll achieve it with our help! Also to make sure we’r going to be profitable to each other, we will take care of your personal portfolio with is list of assets, by creating and diversifying it into different aspects of financial market.

Additional, want to tell you, that we create personal strategy for you, based on your financial situation, time you can set aside time for this, and to prioritize the markets and assets for you. So, that we could prepare it, tell me please…

- experience → goals → housing(mortgage/rent/own house) + family +age→ loans/debts → job → income.

**SAVINGS –** you said you’ve been working as a… for how many years? Did you manage to save up something for yourself?

You are so interesting personality,

Let me also explain how this is going to work for both of us. From our side we provide you software with mathematical algorithms that will analysis the market and will give you information and signals of tends of the market, and of course your personal financial expert, who will be helping you all the time. Our experts have more than 10 years of experience in this field, and will help you avoid common mistakes of beginners, to gain profit as fast, as possible, so you would be able to start to invest by yourself. We are both interested in it, because our profit depends at your profit, because we have some commission from your income, that you made with our help, that first time will be equal 1%. So, we are interested in helping you earn as much, as it possible.

Thus, I see you fit our company perfectly. Do you have some questions for the moment, or we go ahead to the registration step?

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Info warehouse

- Of course as a company we are looking toward for long term relations, but from your perspective as a person who doesn’t have experience, it doesn’t really makes sense to start with long term investments, at the current moment u have a good opportunity to start with minimum and test the water, to figure out for yourself if that’s going to be suitable for you and if you will be satisfied with our services. How does it sounds?

Speech based on news: about new tools for investors, invented by Microsoft.

The main idea is about buying assets by lower price, and selling by higher. There are many factors that affects the market. For example, yesterday Microsoft announced their new AI tools for investors, that will help them to trade more successfully, to manage their portfolio, and analysis the tends of markets, specially of stock market. The biggest grow is anticipated after the releasing of the tools and starting of big excitement round it. So, thus their shares expects will rise up very fast, and catching this moment, is a very good opportunity to invest and make money at Microsoft’s grow.

**REJECTIONS**

“I don’t have time”  
- I completely understand that time is valuable, so let’s make the most of the time we have together. Our solution can actually save you time in the long run, and I’m confident it will be worth you while to hear more. We’ll focus on discussing the key benefits and features that align with your needs right now.

“I want to read the reviews”

- It’s great, that you are interested in hearing from other customers, before making decision. We have a strong track of satisfied clients. You can check it on the web-sites with reviews of broker’s and investment companies. So, during you’ll check it, let me tell you about us and what we provide.

“I want to talk to my wife”

We understand the importance of involving your spouse in financial decisions. By making a deposit now, you demonstrate confidence in your ability to evaluate opportunities independently. Rest assured, our financial advisor is available to provide guidance and support to both of you once the deposit is made.

“I’m not interested”

If there’s anything specific holding you back from making

- hello, and so on.

- hello, I did not registrated nowhere.

- O, let me check the information one mmore time. Yor’e Caren, right? And you are the person who is interested in making some money? That means that I’m calling by the address, because w’re the company, specializing at investments, and I would like to you some about us and what we can provide you.

- Hello, I’m not interested in investments.

- Of course, I understand, that your’e not interested yet, that cause of I didn’t yet told you nothing about the investments, and the great possibilities for you that will be available for you, through cooperation with us.

- So, I’m working in health sector.

- What exactly do you do? Which domain do you specialize in?   
- ……

- Such interesting thing. In past, I wanted to tie my life with medicine too, but went another way, for regret. Believe you like it for real? But what does your family says about it? Most likely They are proud of you. Do you have husband/